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FOREIGN CROPS AND MARKETS

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L A T E C A B L E S

Bulgaria area sown to winter grains for harvest in 1939 reported as follows, with 1938 comparisons in parentheses: Wheat 3,025,000 acres (2,874,000), rye 423,000 (436,000), barley 461,000 acres (431,000). (International Institute of Agriculture, Rome.)

Belgium 1938 production estimates reported as follows, with 1937 comparisons in parentheses: Wheat 20,062,000 bushels (15,550,000), rye 15,157,000 (13,583,000), barley 4,088,000 (3,929,000), oats 42,783,000 (35,839,000), potatoes 119,710,000 bushels (113,568,000), sugar beets 1,325,000 short tons (1,517,000). (International Institute of Agriculture, Rome.)

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IN THIS ISSUE

	Page
Brazil Stimulates Home Production of Wheat	107
Peruvian Cotton Exports Decline in 1938	108
British Bacon-Hog Contracts for 1938-39	110

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THE ORIENTAL WHEAT MARKETS

Prices of domestic wheat and flour in Japan were higher on February 1 than a month earlier, but quotations of United States and Canadian wheats were lower, according to information furnished the Shanghai office of the Foreign Agricultural Service by Consul General C. R. Cameron at Tokyo. Stocks of wheat were ample and mill operations normal, but the domestic flour market was inactive, and there was only a fair export demand. Wheat at the mill on February 1 was quoted as follows, import duty and landing charges included: Western White No. 2, \$1.00 per bushel; Canadian No. 1, \$1.11, No. 3, \$1.06; Australian (nominal) \$1.04; Manchurian \$1.85 per bushel. Domestic standard was \$1.57; Portland wheat, c.i.f. Yokohama, was 70 cents per bushel, import duty and landing charges excluded. The wholesale price of flour at the mill on February 1 was \$1.40 per bag of 49 pounds; c.i.f. Dairen, \$1.42; and, c.i.f. Tangku, \$1.17 per bag.

JAPAN: Imports of wheat, by country of origin, and total exports of flour, December 1938, with comparisons

Country	December			July-December		
	1936	1937	1938	1936	1937	1938
	1,000	1,000	1,000	1,000	1,000	1,000
<u>Imports of wheat</u>	bushels	bushels	bushels	bushels	bushels	bushels
Australia.....	-	617	-	507	1,487	174
Argentina.....	-	-	-	-	73	42
Canada.....	90	15	-	1,719	689	-
United States.....	-	-	-	123	42	-
China.....	90	-	35	705	4	117
Manchuria and others..	267	232	55	672	513	291
Total.....	447	864	90	3,732	2,808	624
	1,000	1,000	1,000	1,000	1,000	1,000
	barrels	barrels	barrels	barrels	barrels	barrels
<u>Exports of flour.....</u>	103	398	180	573	1,404	1,667

Shanghai office, Foreign Agricultural Service.

The Shanghai wheat and flour market on February 15 was temporarily inactive because of the approaching New Year holiday and the arrival of about 800,000 bushels of United States wheat. It was reported, however, that six cargoes of Australian wheat were purchased early in February. Total wheat sales to China this season were estimated at over 3,700,000 bushels; in the opinion of the trade, a similar amount may be taken before the end of the 1938-39 marketing year. Though arrivals of domestic wheat have been small, with imported supplies available the Shanghai mills are now running at almost full capacity. Outport shipments of flour have been small; but, until important bookings of foreign flour were made, the local demand was active. Wheat was quoted at the mill on February 15 as follows: Australian 57.66 cents per bushel, Western white 58.01, domestic spot 54.14 cents per bushel. Domestic flour was 72.34 cents per bag. Wheat imports into China during December 1938 were officially reported as negligible; but 88,000 barrels of flour were imported, of which Japan supplied 53,000 barrels.

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ARGENTINE CROP CONDITIONS

Threshing returns in the Argentine Wheat Zone confirm forecasts of high yields, according to the February report of the Argentine Ministry of Agriculture, and indicate that the total 1938-39 crop, officially placed at about 316 million bushels, was not overestimated. Conditions were particularly favorable in the Provinces of Entre Ríos, Santa Fé, and Córdoba, which together account for about one-half of the total crop, and the quality of the grain was considered very good. In the important Province of Buenos Aires, however, conditions were not so good in the western part, and the quality of the grain was generally unsatisfactory throughout this Province and in the Territory of La Pampa.

The Argentine flaxseed crop has been considerably damaged by army worms and in some areas by adverse weather. The condition of the crop deteriorated after harvesting started, and doubt arises as to whether the first official estimate of about 64 million bushels will be realized. The quality of the crop varied from poor to good, but was considered generally good in the Province of Santa Fé, which produces about a third of the total Argentine harvest.

Rains received in January hampered the harvesting and threshing of small grain to some extent but benefited the corn crop, late varieties of which showed a marked improvement on February 1. Alfalfa fields and pastures were also revived and were said to be in fair to good condition.

BRAZIL STIMULATES HOME PRODUCTION OF WHEAT

By a Presidential decree of December 15, 1938, flour mills in Brazil will be obliged to purchase domestic wheat at a fixed price, the minimum being 600 reis per kilo (96 cents per bushel at the present rate of exchange), according to reports from the American Embassy at Rio de Janeiro.

In addition, Brazilian flour mills will be required to purchase home-grown wheat on the basis of quota allocations to be fixed at a level not less than the equivalent of 10 percent of their average annual total utilization during the past 5 years. No mill will be permitted to import wheat without first submitting proof of the extent to which it has taken its quota of Brazilian wheat.

The purpose of these measures is to facilitate governmental plans to expand Brazilian wheat production to a point where the nation will be as nearly independent of foreign sources of supply as possible. This has been the objective of numerous decrees issued by the Brazilian Government during the past 2 years.

In the past, Brazil imported annually between 25 and 30 million bushels of wheat and an average of about 562,000 barrels of flour, principally from Argentina. These imports represented from 85 to 90 percent of

total requirements. In years of normal wheat prices, wheat growers in Brazil cannot compete, unaided, with those of Argentina, largely because of the greater use of machinery, more efficient labor, and cheaper handling and transportation costs in the latter country. Small quantities of American and Canadian wheat and flour are usually imported, mostly by the markets of northern Brazil, chiefly because of lower transportation costs.

LARGER INDOCHINA RICE EXPORTS EXPECTED IN 1939

Rice exports from Indochina during 1939 have been forecast by trade sources at approximately 60 percent above those of 1938, according to a radiogram received from the Shanghai office of the Foreign Agricultural Service, quoting American Vice Consul John P. Palmer at Saigon. No information has been received regarding the condition of the 1938-39 crop, but the trade forecast would indicate that production is expected to be substantially above the short 1937-38 harvest.

During 1938, actual exports of rice and rice products, according to the consular report, amounted to 2,278 million pounds, compared with 3,287 million in 1937 and 3,759 million in 1936. If the above forecast is borne out, exports during 1939 will be near the average for the past 5 years.

Indochina export rice, which until a few years ago went largely to other Asiatic countries, is now being sold in a much greater volume to European nations, principally France. During the past 5 years Asiatic deficit countries have substantially reduced their rice imports from all sources.

Prices at the end of December in Saigon, alongside ship, export duties and port charges paid, were quoted for No. 1, 25 percent broken, at \$1.09 per 100 pounds, and for rough, No. 1, at 63 cents per 100 pounds. Prices for the same grades of rice at the end of December a year earlier were quoted at \$1.48 and 94 cents, respectively.

PERUVIAN COTTON EXPORTS DECLINE IN 1938

Exports of cotton from Peru declined from 356,076 bales (478 pounds) in 1937 to 306,666 bales in 1938, according to recent information received from trade sources and forwarded by American Consul General Brett at Lima. The drop in exports was largely the result of lower world prices and was attributed only in small part to the slight decline in production. Producers obtained loans and are holding their cotton for a more favorable price. Stocks on hand in ports, railway stations, gins, and warehouses on December 31, 1938, totaled 65,105 bales, compared with 26,706 bales at the end of 1937.

Prices of Peruvian cotton have fallen even more than have world prices because of the poor quality of the 1937-38 crop. Picking was slow, and the cotton was damaged by long exposure to the sun and dust before

being picked. Damage caused by excessive humidity and insects was also reported in some valleys. The same factors were responsible for the slight decrease in production.

PERU: Cotton acreage, production, exports, and domestic consumption, average 1925-26 to 1929-30, annual 1934-35 to 1937-38

Crop year April-March	Acreage	Pro- duction	Year	Exports	Domestic consumption
	Acres	Bales a/		Bales a/	Bales a/
Average 1925-26 to 1929-30	304,302	245,705	Average 1926- 1930	223,277	17,571
Annual -			Annual -		
1934-35	366,986	341,962	1935	340,922	29,767
1935-36	400,519	392,839	1936	348,865	30,032
1936-37	409,025	385,653	1937	356,076	30,885
1937-38	387,999	b/ 375,921	1938 b/	306,666	28,182

Compiled from official sources.

a/ Bales of 478 pounds net.

b/ Preliminary; taken from current consular reports.

PERU: Exports of cotton by leading countries,
average 1926-1930, annual 1935-1938
(In bales of 478 pounds net)

Country	Average 1926-1930	1935	1936	1937	1938 a/
	Bales	Bales	Bales	Bales	Bales
United Kingdom.....	181,387	137,613	151,072	187,883	175,810
Germany.....	21,480	113,807	102,430	102,917	77,459
United States.....	17,558	1,223	763	550	b/
Japan..... c/	1	38,119	53,365	11,929	5,524
Belgium.....	471	19,401	11,728	16,410	12,852
France.....	979	6,263	3,404	10,851	6,670
Netherlands.....	115	2,084	6,067	10,067	13,950
Other countries	1,286	22,412	15,036	14,900	14,401
Total	223,277	340,922	348,865	356,076	306,666

Compiled from Anuario del Comercio Exterior del Peru.

a/ Preliminary. b/ Included in other countries. c/ 4-year average.

Lower prices for Peruvian cotton, together with reduced exports, contributed to the downward trend in the value of Peruvian currency from 25.7 cents, United States currency, in January 1937 to a low point of 20.2 cents in December 1938. Cotton exports are an important factor both in creating foreign exchange and in providing governmental revenue through the cotton export tax. This tax amounts to 10 percent of the proceeds of cotton exports after the cost of transportation (about 3 cents per pound to Liverpool) and the cost of production, as estimated by the Government, (about 8 cents per pound at current rate of exchange) have been subtracted. The present

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price of medium and low grades of cotton does not equal these costs, and the export tax even on the better grades is negligible. The decline in the value of Peruvian currency, while increasing the prices of import items to domestic consumers, will materially benefit cotton producers by increasing the prices received for exported cotton. Since there are no alternative cash crops to which cotton planters can easily turn, it is expected that the present rate of production will continue.

UGANDA COTTON PRODUCTION LOWER

The condition of the Uganda cotton crop at the end of November warranted an estimate of approximately 272,000 bales of 478 pounds, according to a report received from American Consul E. Talbot Smith, at Nairobi, Kenya. This forecast is smaller than the record crop of approximately 349,000 bales produced in 1937-38. The decrease in this season's estimate is partly the result of dry weather, which affected late plantings, and partly of increased damage from insects. Production and acreage have steadily increased. The million-acre mark was reached for the first time in 1932-33, and the peak to date for both acreage and production occurred last season when 1,759,157 acres were planted. All Uganda cotton is exported, principally to India, with smaller quantities going to the United Kingdom and Japan. See table on opposite page.

BRITISH BACON-HOG CONTRACTS FOR 1938-39

Producers have contracted with the Pigs Marketing Board for only about 1.5 million bacon hogs under the new British hog-marketing scheme, according to Agricultural Attaché C. C. Taylor at London. The maximum number to which guaranteed prices might have been applied is 2.1 million for the 1938-39 season, beginning December 1. The Bacon Development Board has had to authorize curers to make up the resulting deficiency with hogs secured on supplementary contracts. Open-market prices for bacon hogs, however, have been maintained at higher levels than those specified in the supplementary contracts, and curers have found it impossible to obtain the desired number through contract. The new scheme does not permit registered curers to make open-market purchases of hogs.

Producers have complained since the first of December because of the transfer of their contracts from one bacon factory to another, often resulting in unusually long-distance shipment and interruption of established business relations. The transfers, according to the Pigs Marketing Board, have been made necessary because of the small number of hogs contracted and because three-fourths of the contracting producers stipulated the curers with whom they wished to deal. As a result, some curers would have had more than their quota of contract hogs and others would have had much less than their quota. Since the Government subsidy is payable to curers only on long-contract hogs and all curers are required to pay the same contract prices, the Board deemed it necessary to allot every curer his share of the contract bacon hogs. Additional transportation costs are not borne by producers, and shrinkage adjustments are allowed and grading is centrally controlled to insure uniformity of treatment.

WHEAT: Closing Saturday prices of May futures

Date	Chicago		Kansas City		Minneapolis		Winnipeg <u>a/</u>		Liverpool <u>a/</u>		Buenos Aires <u>b/</u>	
	1938	1939	1938	1939	1938	1939	1938	1939	1938	1939	1938	1939
	Cents	Cents	Cents	Cents	Cents	Cents	Cents	Cents	Cents	Cents	Cents	Cents
High <u>c/</u> ...	99	71	98	67	109	74	130	64	116	65	d/114	e/60
Low <u>c/</u> ...	90	68	88	64	99	70	121	61	110	62	d/104	e/58
Jan. 21...	95	70	95	66	106	72	126	62	114	f/63	d/109	d/60
28...	93	70	92	66	104	73	125	63	113	65	d/109	d/60
Feb. 4...	95	69	94	65	106	72	128	63	114	63	d/110	d/59
11...	95	68	94	64	106	70	128	62	114	62	d/108	d/60

a/ Conversions at noon buying rate of exchange. b/ Prices are of day previous to other prices. c/ January 1 to February 11, 1939, and corresponding dates for 1938. d/ March futures. e/ February and March futures. f/ New basis, which represents duty-free wheat, used beginning January 1, 1939.

WHEAT: Weekly weighted average cash price at stated markets

Week	All classes and grades six markets		No. 2 Hard Winter Kansas City		No. 1 Dk. N. Spring Minneapolis		No. 2 Hard Amber Durum Minneapolis		No. 2 Red Winter St. Louis		Western White Seattle <u>a/</u>	
	1938	1939	1938	1939	1938	1939	1938	1939	1938	1939	1938	1939
	Cents	Cents	Cents	Cents	Cents	Cents	Cents	Cents	Cents	Cents	Cents	Cents
High <u>b/</u> ...	105	73	105	72	131	80	110	74	102	74	91	68
Low <u>b/</u> ...	100	70	98	68	123	78	107	71	97	72	87	66
Jan. 21...	102	72	104	70	126	80	107	72	100	72	89	68
28...	101	72	102	72	123	80	109	73	101	74	90	67
Feb. 4...	100	71	101	70	129	80	108	73	100	74	91	66
11...	100	70	103	68	125	78	110	71	100	73	90	

a/ Weekly average of daily cash quotations, basis No. 1 sacked.

b/ January 7 to February 11, 1939, and corresponding dates for 1938.

UGANDA: Cotton acreage and production, 1933-34 to 1938-39
(In bales of 478 pounds)

Year	Acreage	Production
	Acres	Bales
Average 1925-26 to 1929-30.....	615,156	131,256
1933-34.....	1,090,502	239,031
1934-35.....	1,185,599	211,918
1935-36.....	1,365,529	268,910
1936-37.....	1,484,829	283,172
1937-38.....	1,759,157	349,038
1938-39..... <u>a/</u>	1,493,477	<u>b/</u> 272,000

Compiled from annual reports and official crop reports of the Uganda Department of Agriculture.

a/ Acres planted to the end of October.

b/ First estimate.

FEED GRAINS AND RYE: Weekly average price per bushel of corn, rye, oats, and barley at leading markets a/

Week ended	Corn				Rye				Oats		Barley	
	Chicago				BuenosAires		Minneapolis		Chicago		Minneapolis	
	No. 3 Yellow		Futures		Futures		No. 2		No. 3 White		No. 2	
	1938	1939	1938	1939	1938	1939	1938	1939	1938	1939	1938	1939
	Cents	Cents	Cents	Cents	Cents	Cents	Cents	Cents	Cents	Cents	Cents	Cents
High b/...	61	53	62	53	90	64	77	47	34	31	82	57
Low b/....	57	48	59	49	80	54	74	45	33	30	78	54
			May	May	Feb.	Feb.						
Jan. 14...	59	52	61	53	90	62	77	46	34	31	80	54
21...	59	51	61	52	82	59	75	45	34	31	82	54
28...	58	50	60	52	80	57	74	46	33	30	82	55
Feb. 4...	57	49	59	51	80	56	74	45	33	30	82	57
11...	57	48	60	49	83	54	75	45	33	30	82	54

a/ Cash prices are weighted averages of reported sales; future prices are simple averages of daily quotations. b/ For period January 1 to latest date shown.

FEED GRAINS: Movement from principal exporting countries

Commodity and country	Exports for year		Shipments, week ended a/			Exports as far as reported		
	1936-37	1937-38	Jan. 28	Feb. 4	Feb. 11	July 1 to	1937-38 b/	1938-39 b/
BARLEY, EXPORTS: c/ bushels	1,000	1,000	1,000	1,000	1,000		1,000	1,000
United States..	5,153	17,614	0	21	31	Feb. 11	11,503	9,117
Canada.....	18,880	14,014				Jan. 31	9,407	12,969
Argentina.....	15,265	10,241	0	0	0	Feb. 11	4,680	0
Danube & U.S.S.R.	26,305	20,050	409	103	8	Feb. 11	17,044	22,973
Total.....	65,603	61,919					42,634	45,059
OATS, EXPORTS: c/								
United States..	912	12,331	2	3	31	Feb. 11	7,503	4,631
Canada.....	10,690	8,504				Jan. 31	5,518	8,258
Argentina.....	25,034	28,505	571	62	772	Feb. 11	19,238	10,161
Danube & U.S.S.R.	940	160	0	0	0	Feb. 11	160	0
Total.....	37,576	49,500					32,419	23,050
CORN, EXPORTS: d/						Oct. 1 to		
United States..	432	139,893	2,090	1,105	925	Feb. 11	19,475	22,541
Danube & U.S.S.R.	25,835	9,790	1,208	309	531	Feb. 11	404	9,122
Argentina.....	401,722	132,495	1,638	1,614	1,442	Feb. 11	79,735	48,193
South Africa...	24,791	23,949	257	35	149	Feb. 11	19,223	5,446
Total.....	452,770	306,127					118,837	85,302
United States imports.....	103,670	1,819				Dec. 31	1,518	104

Compiled from official and trade sources. a/ The weeks shown in these columns are nearest to the date shown. b/ Preliminary. c/ Year beginning July 1. d/ Year beginning October 1.

EXCHANGE RATES: Average weekly and monthly values in New York of specified currencies, February 11, 1939, with comparisons a/

Country	Monetary unit	Month				Week ended			
		1937	1938		1939	1939			
		Jan.	Jan.	Nov.	Dec.	Jan.	Jan. 28	Feb. 4	Feb. 11
		Cents	Cents	Cents	Cents	Cents	Cents	Cents	Cents
Argentina...	Paper peso	32.72	33.33	31.38	31.13	31.13	31.17	31.19	31.24
Canada.....	Dollar.....	99.96	99.98	99.25	99.06	99.19	99.28	99.38	99.48
China.....	Shang. yuan	29.65	29.49	15.80	16.11	16.26	16.23	16.12	15.89
Denmark.....	Krone.....	21.91	22.32	21.01	20.84	20.84	20.87	20.83	20.91
England.....	Pound.....	490.75	499.98	470.75	457.03	466.94	467.53	467.81	468.60
France.....	France.....	4.67	5.34	2.63	2.63	2.64	2.64	2.64	2.65
Germany.....	Reichsmark.	40.22	40.28	40.04	40.08	40.06	40.00	40.11	40.12
Italy.....	Lira.....	5.26	5.26	5.26	5.26	5.26	5.26	5.26	5.26
Japan.....	Yen.....	28.54	29.05	27.43	27.21	27.20	27.24	27.25	27.30
Mexico.....	Peso.....	27.75	27.75	19.97	19.93	19.48	19.46	19.65	20.03
Netherlands.	Guilder....	54.75	55.71	54.33	54.36	54.19	53.88	53.82	53.87
Norway.....	Krone.....	24.66	25.12	23.65	23.46	23.46	23.49	23.50	23.54
Sweden.....	Krona.....	25.30	25.77	24.25	24.05	24.04	24.07	24.10	24.14
Switzerland.	Franc.....	22.94	23.12	22.65	22.61	22.58	22.57	22.58	22.65
Federal Reserve Board. <u>a/</u> Noon buying rates for cable transfers.									

WHEAT, INCLUDING FLOUR: Shipments from principal exporting countries, as given by current trade sources, 1936-37 to 1938-39

Country	Total		Shipments 1938			Shipments	
	shipments		week ended			July 1-	Feb. 11
	1936-37	1937-38	Jan. 28	Feb. 4	Feb. 11	1937-38	1938-39
	1,000	1,000	1,000	1,000	1,000	1,000	1,000
	bushels	bushels	bushels	bushels	bushels	bushels	bushels
North America <u>a/</u>	231,832	184,720	5,496	6,484	5,476	117,848	152,136
Canada <u>b/</u>	213,028	94,546	2,234	3,318	-	70,400	111,400
United States <u>d/</u>	10,395	83,651	3,929	2,340	3,676	48,010	53,425
Argentina.....	164,678	66,928	2,112	3,769	2,149	32,528	40,598
Australia.....	105,836	127,520	2,804	1,983	3,609	54,132	55,384
Soviet Union.....	88	42,248	280	112	224	33,912	38,848
Danube and Bulgaria <u>e/</u>	65,544	37,320	1,240	1,496	1,584	28,024	33,344
British India <u>a/</u>	116,571	19,677	0	0	0	10,960	6,280
Total <u>g/</u>	584,549	478,413				277,404	326,590
Total European						<u>h/</u>	<u>h/</u>
shipments <u>a/</u>	484,670	397,656	10,184			219,008	254,760
Total ex-European						<u>h/</u>	<u>h/</u>
shipments <u>a/</u>	127,192	99,400	2,368			51,640	65,992

Compiled from official and trade sources. a/ Broomhall's Corn Trade News.

b/ Official exports as reported to date, supplemented by reported weekly clearances of wheat and estimates of flour shipments. c/ To February 4 only. d/ Official reports received from 16 principal ports, only. e/ Black Sea shipments only. f/ Official. g/ Total of trade figures includes North America as reported by Broomhall. h/ To January 28.

Index

	Page	::	Rice:	Page
Late cables	105	::	Export prospects, Indochina, 1939	108
		::	Exports, Indochina, 1937, 1938 ..	108
		::	Prices, Indochina, Dec. 31, 1938	108
		::	Rye:	
Barley:		::	Area (winter), Bulgaria,	
Area (winter), Bulgaria		::	1938, 1939	105
1938, 1939	105	::	Prices, U.S., Feb. 11, 1939	112
Production, Belgium, 1937, 1938 ..	105	::	Production, Belgium, 1937, 1938 ..	105
Cotton:		::	Sugar beets, production, Belgium,	
Area, Peru, 1934-1937	109	::	1937, 1938	105
Consumption, Peru, 1935-1938 ...	109	::	Wheat:	
Exports, Peru, 1935-1938 ...	108, 109	::	Area (winter), Bulgaria,	
Production:		::	1938, 1939	105
Peru, 1934-1937	109	::	Exports (flour), Japan,	
Uganda, 1937, 1938	110	::	December 1938	106
Stocks, Peru, Dec. 31, 1938	108	::	Harvesting conditions,	
Exchange rates, foreign,		::	Argentina, February 1939	107
Feb. 11, 1939	113	::	Imports, Japan, December 1938 ..	106
Flaxseed, harvesting conditions,		::	Market conditions:	
Argentina, February 1939	107	::	China, Feb. 15, 1939	106
Grains (feed):		::	Japan, Feb. 1, 1939	106
Movement, principal countries,		::	Prices:	
Feb. 11, 1939	112	::	Shanghai, Feb. 15, 1939	106
Prices, principal markets,		::	Specified markets, Feb. 11, 1939	111
Feb. 11, 1939	112	::	Tokyo, Feb. 11, 1939	106
Hogs (bacon), contracts, U.K.,		::	Production:	
1938-39	110	::	Argentina, 1938-39	107
Oats, production, Belgium,		::	Belgium, 1937, 1938	105
1937, 1938	105	::	Production aids, Brazil, 1939 ..	107
Potatoes, production, Belgium,		::	Shipments, principal countries,	
1937, 1938	105	::	Feb. 11, 1939	113

